



FAMILY INDEPENDENCE ADMINISTRATION

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POS RELEASE NOTES VERSION 13.2.1

Date: August 25, 2009	Subtopic(s): POS
<p> This procedure can now be accessed on the FIAweb.</p> <p> Please use Print on Demand to obtain copies of forms.</p>	<p>This policy bulletin is to inform Job Center staff that the latest version of the Paperless Office System (POS) will migrate to production on August 31, 2009. Descriptions of the changes can be found in POS Release Notes Version 13.2.1 (Attachment A) and POS Release Notes: Appendix A Version 13.2:1 (Attachment B).</p> <p>These release notes can also be found on the HRA Intranet at: http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79</p> <p><i>Effective August 31, 2009</i></p> <p>Attachments:</p> <p>Attachment A POS Release Notes Version 13.2.1 Attachment B POS Release Notes Version 13.2.1: Appendix A</p>

HAVE QUESTIONS ABOUT THIS PROCEDURE?
Call 718-557-1313 then press 3 at the prompt followed by 1 or
send an e-mail to *FIA Call Center*

POS Release Notes

Version 13.2.1 August 31, 2009

These Release Notes contain descriptions of changes in POS Release 13.2.1 scheduled for August 31, 2009. These have been distributed via HRA email. If you would like to be added to the distribution list, please contact **Sandra Hilton**. These and prior Release Notes may also be found on the HRA Intranet at http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79

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1. Updated Vital Records Collateral Call

POS will resume the Birth Verification process with NYC Vital Records for applicants/participants. POS will validate the Birth Certificate based on the Department of Health and Mental Health (DOHMH) records.

DOHMH will be hosting a web service which will return a system validation. The validation process should consist of two parts:

- Birth Authentication
- Death report check.

The death verification is based on the Death Report results from DOHMH. It represents the info about the demographics entered showing the individual as deceased. The data is passed to POS for possible follow up action by the worker. The System will process this validation as well as the Birth Records search.

Only POS workers who are allowed in the application interview and recertification activities can process the call to Vital Records for Birth Authentication:

- Entering the Birth Certification number in the Individual Details window (if available) will narrow the search and make it possible to receive a single exact match.
- Based on the results they obtained from DOHMH, the worker may have to continue to process the verification.
- The Vital records messages will determine if the worker must follow-up with any additional action.

The screenshot shows the 'Paperless Office System' interface. At the top, it displays 'Version 13.2.1 - Paperless Office System' and the date/time '3:14:50 PM Wednesday, August 12, 2009'. Below the menu bar (File, Edit, Tools, Window, Help) is a toolbar with various icons. The main content area is divided into several sections:

- Data from System:** A table with columns: First Name, Last Name, DOB, Sex, Birth Cert No, County of Birth.

First Name	Last Name	DOB	Sex	Birth Cert No	County of Birth
Test111	Verification	05/23/1976	F		Brooklyn
Test	Verification	12/12/1975	M		New York
- Instructions:** A text block stating: 'Displayed below are the results of the birth verification match with Vital Records NYC for the above named individual. Please review results and messages carefully. Some return codes require follow-up action'.
- Returned Results:** A table with columns: Return, SSN, First Name, Last Name, Sex, DOB, Mothers Maiden Name, Birth Cert No, Deceased, Verification Date.

Return	SSN	First Name	Last Name	Sex	DOB	Mothers Maiden Name	Birth Cert No	Deceased	Verification Date
NO Match Found	038-59-5000	Test111	Verification	F	05/23/1976				08/10/2009
- Messages:** A text block stating: 'Messages: Birth Verification clearance shows that no matches were found for this individual. Documentation for citizenship, identity and age should be collected if not already submitted.'
- Close:** A button at the bottom center of the window.

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- The individuals born in a New York City borough will appear at the top of the window, with the data submitted to DOMMH.
- The User must click on the name to view the result of the collateral call:

Data from System					
First Name	Last Name	DOB	Sex	Birth Cert No	County of Birth
Test111	Verification	05/23/1976	F		Brooklyn
Test	Verification	12/12/1975	M		New York

- The results will be displayed for each selected individual:

Instructions

Displayed below are the results of the birth verification match with Vital Records NYC for the above named individual. Please review results and messages carefully. Some return codes require follow-up action

Returned Results

Return	SSN	First Name	Last Name	Sex	DOB	Mothers Maiden Name	Birth Cert No	Deceased	Verification Date
NO Match Found	038-59-5000	Test111	Verification	F	05/23/1976				08/10/2009

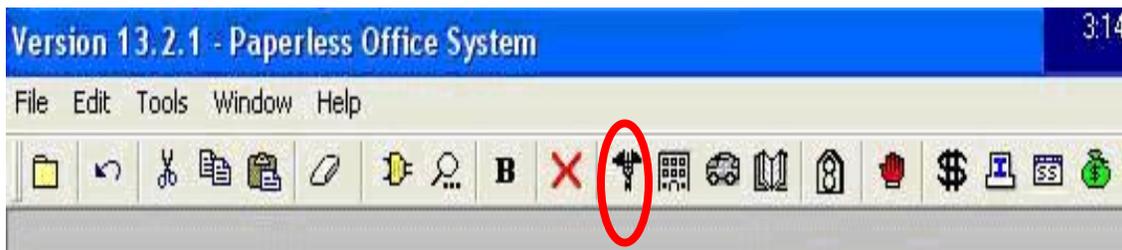
Messages: Birth Verification clearance shows that no matches were found for this individual. Documentation for citizenship, identity and age should be collected if not already submitted.

The worker may need to add or change existing demographic information on the individual detail window based on the verification results.

They may also need to modify the birth certificate number if it has been entered incorrectly on this window and **click re-run BV process**.

Vital Records Collateral Call

The Vital Records result can also be seen by clicking on the Vital Records Icon in the toolbar.



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Vital Records Short Description/ Messages

Description	Return Message	Messages
The System cannot authenticate the Worker! Please contact: helpdesk-pos@hra.nyc.gov	Cannot Authenticate	The System cannot authenticate the Worker! Please contact: helpdesk-pos@hra.nyc.gov
You are missing some required entries. Please return to the Individual Details window and fill in all data including parents' names.	Return to Individual Details	You are missing some required fields. Please return to the Individual Details window and fill in all data including parents' names.
You have exceeded the maximum number of clearances allowed for this individual. Please continue with the next person on the case.	Exceeded no. of attempts	You have exceeded the maximum number of clearances allowed for this individual. Please continue with the next person on the case.
Multiple Match found based on spelling of first and last names, DOB, gender.	Multiple Match	Birth Verification has been received from Vital Records. More than one person has been found with matching data.
Multiple Match found based on spelling of first and last names, DOB, gender. Individuals have been verified as Deceased.	Deceased - Multiple Match	Birth Verification has been received from Vital Records. More than one person has been found with matching data, all of whom are deceased. Case should be referred to BFI. Select link from Help Menu and submit Form BFI-14.
Multiple Match found based on spelling of first and last names, DOB, gender and mother's maiden name.	Multiple Match	Birth Verification has been received from Vital Records. More than one person has been found with matching data.
Multiple Match found based on spelling of first and last names, DOB, gender and mother's maiden name. Individuals have been verified as Deceased.	Deceased - Multiple Match	Birth Verification has been received from Vital Records. More than one person has been found with matching data, all of whom are deceased. Case should be referred to BFI. Select link from Help Menu and submit Form BFI-14.
Multiple Match found based on spelling of first and last names, DOB, gender and Birth Certificate number.	Multiple Match	Birth Verification has been received from Vital Records. More than one person has been found with matching data.
Single match found using four-factor matching (exact spelling of first name, last name, date of birth, and gender).	Single Match	Birth Verification has been received from Vital Records. The externally verified checkbox on the Individual Details window will be checked for citizenship and age. One additional document is needed for proof of identity if not already submitted.
Single match found using five-factor matching (with exact spelling of first name, last name, date of birth, gender, and with mother's maiden name normalized)	Single Match	Birth Verification has been received from Vital Records. The externally verified checkbox on the Individual Details window will be checked for citizenship and age. One additional document is needed for proof of identity if not already submitted.
Single match found using four-factor matching (exact spelling of first name, last name, date of birth, and gender) after failing using the five-factor matching (with exact spelling of first name, last name, date of birth, gender).	Single Match	Birth Verification has been received from Vital Records. The externally verified checkbox on Individual Details window will be checked for citizenship and age. One additional document is needed for proof of identity if not already submitted.
Single match found with provided birth certificate number, first name, last name, gender and date of birth.	Single Match	Birth Verification has been received from Vital Records. The externally verified checkbox on the Individual Details window will be checked for citizenship and age. One additional document is needed for proof of identity if not already submitted.
Single match was found for the individual. Individual has been verified as Deceased.	Deceased - Single Match	Birth Verification has been received from Vital Records. Only one person has been found with matching data and this person is deceased. Case should be referred to BFI. Select link from

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Description	Return Message	Messages
		Help Menu and submit Form BFI-14.
Single match was found for the individual. Individual has been verified as Deceased.	Deceased - Single Match	Birth Verification has been received from Vital Records. Only one person has been found with matching data and this person is deceased. Case should be referred to BFI. Select link from Help Menu and submit Form BFI-14.
NO Match found based on Birth Certificate number, first and last names, DOB and gender.	NO Match Found	Birth Verification clearance shows that no matches were found for this individual. If Birth Certificate number entered has been verified, case should be referred to BFI. Select link from Help Menu and submit Form BFI-14.
NO Match found based on spelling of first and last names, DOB, gender.	NO Match Found	Birth Verification clearance shows that no matches were found for this individual. Documentation for citizenship, identity and age should be collected if not already submitted.
NO Match found based on spelling of first and last names, DOB, gender.	NO Match Found	Birth Verification clearance shows that no matches were found for this individual. Documentation for citizenship, identity and age should be collected if not already submitted.

2. POS Budget Synchronization

POS will synchronize with the “current active budget” (CAB) received from WMS to update budget-related information within the interview when it finds an update. For example, if the participant’s income is updated by a Mass Re-Budgeting (MRB) from WMS, POS will update the income window with the new income amount the next time a Worker opens the case. This will help ensure that the information in POS and WMS matches.

3. Reminder: Unearned Income Reconciliation

A new window named **Unassigned Income from Current Active Budget** was added in POS release 13.2 to reconcile the POS budget and interview data when there is income with income source code of 98 or 99 that is not associated with a POS interview window.

This window appears when the Worker clicks on the **New Budget** button in the **Existing Budgets** window or when the Worker closes the **Latest Synchronized Budget** window in the **Change Case Data** activity.

The Worker will need to indicate the specific income type. If the income type is “Contributions for Excess Rent”, the Worker will need to indicate the contributor, what the contribution pays for and whether it is a loan. If the client is disputing the information from the current active budget, the Worker must indicate whether he/she has proof that he/she does not receive the budgeted income or that the income has stopped.

Once the income type has been specified, POS will update the appropriate interview section.

If there is additional unassigned income with source code 98 or 99, the window will appear for the next income row, until all unassigned unearned income is updated.

Unassigned Income from Current Active Budget

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Unassigned Income from CAB

Instructions

The following information was obtained from the Current Active Budget (CAB) in WMS. The Information with the blue font is income type 99 from the CAB that is not identified in POS.

Select the appropriate income type. If you are not able to determine the Income type, select 'Other Unearned Income' from the radio buttons. POS will update the interview questions. If the income type is 'Contributions for Excess rent', you must go to the Shelter window to complete the information for the next new POS budget.

If there is more than one income source, it will show up once you click on the 'Next' button. You must address all discrepancies before you can continue to authorize a new budget.

Unassigned CAB Income		
Line No	Name	
1	JOSE TESTTWO	
Ind PA & FS Statuses		
ACTIVE	ACTIVE	
Income Type		
99	Other Unearned Income	
Amount	Pd	Prog Ind.
20.00	Monthly	

Is the client present? Yes No

Is the client disputing the information? Yes No

Does the client have documentation to support this claim? Yes No

Income Assignment

<input type="radio"/> GI Dependency Allotment	<input type="radio"/> Contributions for Excess Rent
<input type="radio"/> No fault insurance benefit	<input type="radio"/> Contribution / Gift (non rent)
<input type="radio"/> Tuition Fees	<input type="radio"/> Training Allotment
<input type="radio"/> Income From a Trust	<input type="radio"/> Other Unearned Income

Contribution to Pay for General Earmarked & Verified

Loan? Yes No

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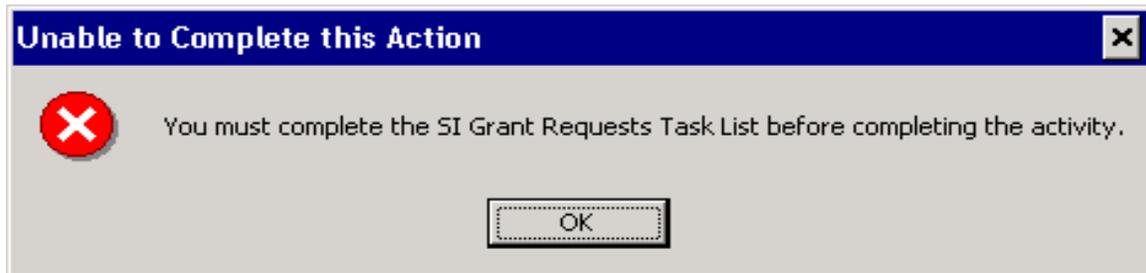
Version 13.2.1 August 31, 2009

4. Revision to Single Issue Completion Edit

An existing edit in the POS activities requires the worker to visit the **Single Issue Grant Requests** window before suspending or completing the Cash Assistance (CA) activities that includes this window. The edit will now display only if the following windows are opened and the POS PA status is applying (AP), single issue (SI) or active (AC):

- Electric/gas bill separate from rent or shelter expense
- Heat bill separate from rent or shelter expense
- Rent Arrears

Error Message



5. ADVENT Program Case Transfer

Cases that belong to the following ADVENT centers will not be transferable. The centers are Linden Model Office #067, East End Model Office# 023, and Crotona# 046. The caseload numbers for cases that belong to ADVENT are **00689**.

6. Minimum Wage Increase

The Federal Minimum wage has increased to \$7.25 per an hour. As a result the POS Immediate Needs/ Expedited FS window has been updated to reflect the new amount. In addition, the associated business rules will reflect the Federal Minimum wage increase.

7. Updates to Application Referrals Activity for Finger Imaging Referrals

Since AFIS operators only accept the POS generated W-519 AFIS Referral form, the Application Referral activity will be updated to allow the printing of the AFIS referral in the following instances:

- Closed or rejected cases
- Clients on Single Issue or Active case status for whom the form was previously printed.

For additional details, please see **Appendix A**.

8. Central Office Access Rights

Cash Assistance Regional offices were granted access to all centers within their regions.

Attachment A

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9. Updates to Refer Back to Worker Window

The “Refer Back to Worker” button and the “Refer to Worker” window in the Approval Elements window in POS approval activities allows Supervisors to send cases back to Workers for correction. The window was revised to allow Supervisors from Cash Assistance Regional Offices to send the case back to a Worker from their office or from the “home center” for the case.

Updated Refer Back to Worker Window – New Control for Change Center / Regional Offices

Title	Unit	Last Name	First Name	U/W	Phone Number
FS Supervisor	FS	Batov	Olga	FPOS1	(718) 220-2222
FS Supervisor	FS	OSTA	Madhu	FPOS4	(718) 510-0564
FS Supervisor	RCT	Breton	Jose		(718) 510-8589
Supervisor		Shah	Kamal		
Supervisor	DEV	Chauhan	Haresh	POS1	
Supervisor	DEV	Papavasiliou	Kathy	POSDM	(718) 510-0483

10. Updates to POS “Help About” Window

The POS “**Help About**” Window will now have two additional indicators to assist Help Desk and development staff to easily determine **User and PC information**:

- POS Title
- Caseload

About

Version 13.2.1 - Paperless Office System
POS Is Running From Citrix Server: DEVCTXB

Sybase PowerBuilder Enterprise Version 9

Compile Date: 7/15/2009 23:29:59 User ID: 68C685/099
Machine Name: W15MTC16J088B/040 DB name: 084/ADEV
Current Case: 099 - - 00
Parent/Current Activity: 0 0
POS Title/Caseload: 7 - Supervisor SHPOS
COM Farm: PING COM Farm IP: 10.253.32.113
Power TCP: PING
Aquanta IP: K13PBZ
PID: xxx
Environment: Z/Z
Distributed App: PING
AppServer IP: 10.253.32.113
Printer: \\10.253.32.113\10_253_29_236
eForms Webserver: FNPOS

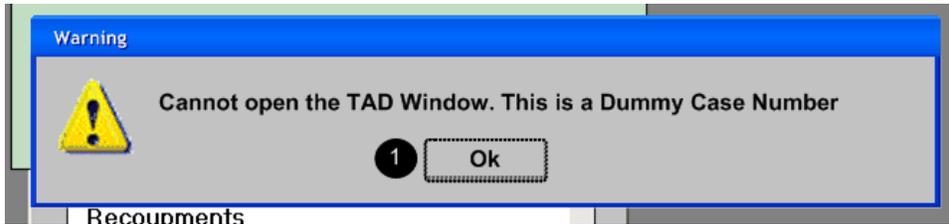
OK

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11.Restricting the TAD Window

Due to a number of errors occurring within POS based on the use of the dummy case number, POS will now provide the following error message when the worker attempts to open the TAD window.



This error message will be enabled in any activity in which a TAD window is accessible.

12. Form W-137B Data Entry Window Edits

The W-137B will now have additional edits to require the worker to complete all the required information. This will prevent the printing of incomplete or blank forms. Once the information is complete the worker will be able to proceed with their activity.

13. Question Description Update for Referrals window

The following updates will be made in the **Referrals** window:

Prior Description	New Description
BEV	Bureau of Eligibility Verification (BEV)
Anyone Applying Under 21 Whose Parent(s) Is (Are) Absent?	Office of Child Support Enforcement (OCSE)

14. Job Title Update

POS job titles for staff in the enrollment window and POS queues for Job Centers will be updated to add the letters "CA" at the beginning of the title. This will help differentiate the titles used for Job Center staff from the titles used for Food Stamp Center staff.

13. E-Forms

The following E-Form was **updated**:

- W-119, Request for Contact on a Food Stamp Application.

Attachment B

POS Release Notes: Appendix A

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Overview

Finger-imaging (AFIS) is mandatory for certain individuals. This desk guide covers the steps that must be completed to generate the W-519 (Finger Imaging Notice) form for Cash Assistance (CA) cases in single issue (SI) or active (AC) status.

Printing the W-519

To print the W-519 form for a CA case in single issue (SI) or active (AC), follow the steps listed below:

- Access the **Application Referrals** Activity from the Action Menu

Case Number	Suf	Case Name	Casehead Name	CIN	SSN	File Date
-------------	-----	-----------	---------------	-----	-----	-----------

- The CIN Re-use window will appear. Go past the CIN Re-use Window and access Finger Imaging Referral Window.

Ln	Suf	First Name	MI	Last Name	Sex	SSN	DOB	AFIS Ex Ind	CIN	CNTR	Case/Reg #
----	-----	------------	----	-----------	-----	-----	-----	-------------	-----	------	------------

The selected CIN match is indicated by the arrow. You may highlight the suggested CIN match or chose another appropriate CIN from the clearance.

Do you wish to use a new CIN because there is no appropriate Cin match in the clearance? Yes No

Attachment B

POS Release Notes: Appendix A

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Printing the W-519 (continued)

- For individuals who need to be finger-imaged, select “Agrees to be Finger Imaged”.

The screenshot shows a software window titled "Finger Imaging Notice (Form W519)". The window has a menu bar (File, Edit, Tools, Window, Help) and a toolbar. The main content area is divided into sections. The first section, "Finger Imaging Notice (Form W519)", contains text about state regulations and a list of exemption criteria. Below this is a section titled "Telephone Interview" with a checkbox. Underneath, there are several radio button options. The second option, "I agree to be finger imaged.", is selected. To the right of these options is a text input field containing the name "Perez Maga". At the bottom of the window are three buttons: "Done", "Print", and "Previous".

- For individuals who do not need to be finger-imaged, select “Not present at Interview”.

The screenshot shows the same software window as above. In the "Telephone Interview" section, the first radio button option, "The applicant is not present at the interview", is now selected. The text input field to the right now contains the name "Torez Frank". All other elements, including the menu bar, toolbar, and buttons at the bottom, remain the same.

Attachment B

POS Release Notes: Appendix A

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Printing the W-519 (continued)

- Capture signatures of those marked as “Agrees to be Finger-Imaged”.
- Click Next to save each signed form:
 - If there are additional individuals who have agreed to be finger-imaged, a new signature window will appear.
 - Once all required signatures are captured, the Finger Imaging Referral window will appear again.

The screenshot shows a software window titled "Signature - Form Number: W519". The window has a menu bar with "File", "Edit", "Tools", "Window", and "Help". Below the menu bar is a toolbar with various icons. The main content area contains the following elements:

- Instructions:** A text box with the following text: "Retrieve the form from the printer and place the page on the signature pad. Click on the **Sign** button. The signature capture window will appear. Ask the client to sign and click on the **Accept** button to save the signature. Click on the **Next** button to continue. The signed form will be saved in the electronic case record." Below this, it says: "If the signature pad is not working, please check the 'Unable to Capture Signatures' checkbox and select 'Signature pad is not working' in the pop-up window and click on the **OK** button. The POS signature capture fields will be disabled. You must print the form by clicking on the **Print** button. The printed form will not be saved in the electronic case record. Give the printed form to the client to sign. After the client signs the form, scan and index it into POS."
- Signature Field:** A text box labeled "Signature" containing the name "Maga Perez".
- Unable to Capture Signatures:** A checkbox labeled "Unable to Capture Signatures" which is currently unchecked.
- Sign Button:** A button labeled "<< Sign" located to the right of the signature field.
- Navigation Buttons:** Three buttons at the bottom: "Next", "Re-Print", and "Previous".

- End the activity by clicking “Done”.